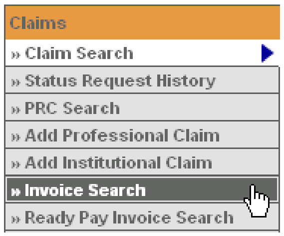
Add a New Invoice

Add a new invoice:

1. Select the **Billing** module.
2. Click **Invoice Search** on the navigation bar.



3. Click Add Invoice.
4. Select a contract and click Select Contract .
5. Enter **Billing Period** dates. The **Invoice Reference Number** field is available for providers who want to enter a reference number for internal tracking purposes.
6. Click Save New Invoice.

Update a Category 1 Line Item

Update a Category 1 Line Item:

Depending on the program, you may or may not need to enter a Personnel Summary for Category 1 line items. From this point forward you can enter Category 1 line items as non-Category 1 line item.

To update a Category 1 Line Item:

1. Access the **Invoice Summary** page.
2. Select **Personnel Summary** in the navigation bar.
3. Click Add Personnel Summary.
4. Select a Budget Number.
5. Click Select

*The **Personnel Summary Add** page appears.*

6. Enter all required information.

Click Add Personnel Summary.

Tips

- Invoices **must be submitted sequentially**; if there are no expenses during a billing period, provider must submit a zero balance.

- If an organization needs to submit more than one invoice a month, a *supplemental* invoice can be created.

Update a non-Category 1 Line Item

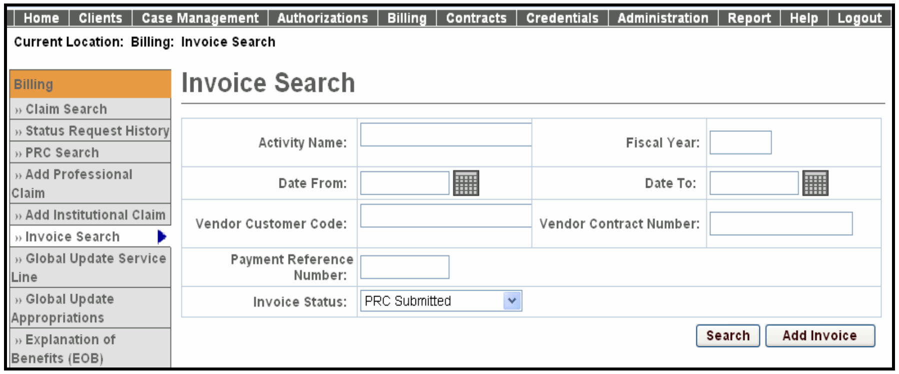
Update a non-Category 1 Line Item:

1. Repeat step 1 from above to access an invoice.
2. Click a line item link.
3. Enter an invoice amount.
4. Click Save Changes to update this line item.

Searching for an Invoice

Searching for an invoice:

1. Select the **Billing** module and **Invoice Search** on the navigation bar.



The Invoice Search page appears.

2. Enter your search criteria in one of the following fields:
   - Program Name
   - Date From
   - Date To
   - Vendor
   - Payment Record Number
   - Invoice Status

Tip: Use the wildcard **%** to search for records beginning with or ending with a text string. Or use partial criteria by entering the beginning letters or text string.

Searching for an Invoice (continued)

3. Click **Search** .

The Search results appear.

Activity Name	Date From	Date To	Vendor Customer Code	Payment Reference Number	Contract Number	Status
INDIVIDUAL SUPPORT (BLANKET)	07/01/2005	07/30/2005	DPH9999		HHSCR1001	PRC Submitted
INDIVIDUAL SUPPORT (BLANKET)	07/01/2005	07/30/2005	DPH9999	07051023	HHSCR1023	PRC Submitted
INDIVIDUAL SUPPORT (BLANKET)	07/01/2005	07/30/2005	DPH9999	7051024	HHSCR1024	PRC Submitted
INDIVIDUAL SUPPORT (BLANKET)	07/01/2005	07/30/2005	DPH9999	7051053	HHSCR1053	PRC Submitted

4. Click the Activity Name link.

The Invoice Summary Page appears including information about the invoice you selected.

Invoice #515

Update Invoice

Corporate Name:	Provider Org 1023	State Agency Name:	Department of Mental Health
Vendor Customer Code:	HHS1023	Invoice Status:	PRC Submitted
Service Contract Number:	HHSCR1023	Service Contract Amendment Number:	
Billing Period:	07/31/2005 - 08/31/2005	Invoice Reference Number:	08051023
Supporting Documentation Reference Number:	07051023	Supporting Documentation Description:	
Supporting Documentation Type:		Invoice Type:	Regular
Service Delivery Report:			

Saving, Releasing and Disapproving an Invoice

Save an Invoice:

If you have updated an invoice and want to save it:

1. Access the **Invoice Summary** page.
2. Click [Save Invoice].

Release an invoice:

If the invoice is ready to be authorized:

3. Access the **Invoice Summary** page.
4. Click [Release Invoice].

Disapprove an invoice:

To change the status of an invoice with an error from **released** to **draft**:

1. Access the **Invoice Summary** page of a released invoice.
2. Click [Disapprove Invoice].

Authorizing and Copying an Invoice

Authorize an invoice:

If the invoice is ready to be authorized and submitted:

1. Access the **Invoice Summary** page of a released invoice.

Click [Authorize Invoice].

Copy an invoice forward:

To copy an invoice forward:

1. Access the **Invoice Summary** Page of an invoice from a previous month.
2. Enter the new Billing Period Date and any additional information.
3. Click [Copy Invoice].

Tip: You can copy invoices in any status except **Draft.**

Track Payment	
Search for a Payment Request for Commodity (PRC) 1. Select the **Billing** module and select **Search for PRC** on the navigation bar. 2. Enter search criteria and click Search . 3. Click the Program Name link. *The **Update PRC** page appears.* **View adjudication information for a paid invoice** 1. Access the **Invoice Summary** page. 2. Select a program. 3. Select a line item. *The Line Item summary lists the adjudications, amounts, and status for each line item.*	**Virtual Gateway Help Desk** **1-800-421-0938**